Insurance
Skill Standards Checklist

CERTIFICATION AREAS COMPLETED:

____ Core Abilities

____ Principles of Insurance

____ Principles of Property & Liability Insurance

____ Principles of Life and Health Insurance

____ Customer Service

____ A minimum of 900 work hours

Student Name_____

School District_____

YA Consortium_____

YA Coordinator_____

High School Diploma/GED/HSED

Date Received_____

Level One Requirements: Complete Core Abilities
and <u>two</u> of the certification areas above.
A minimum of 450 work hours.

Total Hours Employed	**Company Name**	**Phone #**
_____	_____	_____
_____	_____	_____
_____	_____	_____
	_____	_____

Instruction for the Worksite Mentor

The Skill Standards Checklist is a list of competencies (tasks) to be achieved through mentoring at the worksite.

- Each competency has three levels.
- The worksite mentor should rate each competency as the student acquires and demonstrates the skill.
- A competency may be revisited and the score raised as the student becomes more proficient at the worksite.
- The mentor and the student should go over the checklist together on a regular basis (at a minimum every 9 weeks) to record progress and plan future steps to complete the required competencies.

Please sign this page if you have been a mentor, trainer or instructor of this student.

CERTIFICATION: I certify that this student has successfully completed the competencies required in my department.

_____	**Mentor/Trainer Signature**	_____	Printed Name
_____	Department	_____	Date Signed
_____	**Mentor/Trainer Signature**	_____	Printed Name
_____	Department	_____	Date Signed
_____	**Mentor/Trainer Signature**	_____	Printed Name
_____	Department	_____	Date Signed
_____	**Mentor/Trainer Signature**	_____	Printed Name
_____	Department	_____	Date Signed
_____	**Mentor/Trainer Signature**	_____	Printed Name
_____	Department	_____	Date Signed
_____	**Instructor Signature**	_____	Printed Name
_____	Department	_____	Date Signed
_____	**Instructor Signature**	_____	Printed Name
_____	Department	_____	Date Signed

Core Abilities   Required

Core abilities address broad knowledge, skills, and attitudes that go beyond the context of a specific course. These standards are not taught in specific lessons. These are the employability skills that are critical for success in the insurance industry.

RATING:

  3 = Consistently displays this behavior

  2 = Often displays this behavior

  1 = Rarely displays this behavior

<u>**Score**</u>

1.	Works productively	3	2	1
2.	Learns effectively	3	2	1
3.	Communicates clearly with supervisor and others	3	2	1
4.	Works cooperatively with others	3	2	1
5.	Acts responsibly	3	2	1
6.	Thinks critically and creatively	3	2	1
7.	Works as a team member	3	2	1
8.	Works well with individuals from diverse backgrounds	3	2	1
9.	Chooses ethical courses of action	3	2	1

All competencies in this section must be rated 2 or higher

Comments:

Principles of Insurance

RATING:

3 = Able to perform entry-level skills.

2 = Has performed skill during training program; additional training is required to develop entry level skills.

1 = Familiar with process, no opportunity to perform during training program or unable to perform job with entry-level skills.

		Score		
1.	File by claim number.	3	2	1
2.	File by policy number.	3	2	1
3.	File by agency/producer codes.	3	2	1
4.	File by name.	3	2	1
5.	File by date.	3	2	1
6.	File by terminal digit.	3	2	1
7.	File using suspense filing.	3	2	1
8.	File and retrieve files manually.	3	2	1
9.	File and retrieve files by computer.	3	2	1
10.	Perform record transfer.	3	2	1
11.	Apply barcode and perform barcode filing.	3	2	1
12.	Use and store microfilm and microfiche.	3	2	1
13.	Use photocopy machine.	3	2	1
14.	Sort and stamp incoming mail.	3	2	1
15.	Prepare mail for distribution.	3	2	1
16.	Distribute mail.	3	2	1
17.	Sort by codes.	3	2	1
18.	Pick up and prepare outgoing and interoffice mail.	3	2	1
19.	Use UPS mail service.	3	2	1
20.	Use Federal Express (overnight packages).	3	2	1
21.	Use certified mail.	3	2	1
22.	Handle internal and external calls.	3	2	1
23.	Record telephone messages on paper.	3	2	1

24. Use basic telephone services and equipment.   3   2   1

25. Use FAX equipment.   3   2   1

Total # of Points _____ (a score of 44 or greater is required)

Comments: _____

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Principles of Property and Liability Insurance

RATING:

3 = Able to perform entry-level skills.

2 = Has performed skill during training program; additional training is required to develop entry level skills.

1 = Familiar with process, no opportunity to perform during training program or unable to perform job with entry-level skills.

		Score		
1.	Perform basic rating and quoting.	3	2	1
2.	Review and update loss lists.	3	2	1
3.	Gather or update information on application.	3	2	1
4.	Order inspection reports.	3	2	1
5.	Identify level of binding authority.	3	2	1
6.	Review applications for issues from guidelines.	3	2	1
7.	Issue binders and certificates.	3	2	1
8.	Set up notices of non-renewal.	3	2	1
9.	Generate reporting forms/audit support.	3	2	1
10.	Perform teleprocessing.	3	2	1
11.	Submit a claim.	3	2	1
12.	Set up a claim file.	3	2	1
13.	Verify coverage and type of loss.	3	2	1
14.	Enter claim information into the computer.	3	2	1
15.	Order verifying reports.	3	2	1
16.	Generate appropriate response.	3	2	1
17.	Identify the flow of various types of claims.	3	2	1
18.	Use basic medical terminology.	3	2	1
19.	Use appropriate medical coding.	3	2	1
20.	Read, understand and complete universal forms.	3	2	1
21.	Prepare a claim payment.	3	2	1
22.	Verify the accuracy of computer entries.	3	2	1
23.	Recognize fraudulent claims.	3	2	1

Total # of Points _____ (a score of 42 or greater is required)

Principles of Life and Health Insurance

RATING:

3 = Able to perform entry-level skills.

2 = Has performed skill during training program; additional training is required to develop entry level skills.

1 = Familiar with process, no opportunity to perform during training program or unable to perform job with entry-level skills.

			Score	
1.	Set up customer files.	3	2	1
2.	Complete and code applications.	3	2	1
3.	Order reports.	3	2	1
4.	Assemble a policy.	3	2	1
5.	Process policy endorsements including manual rating.	3	2	1
6.	Type forms on typewriter/computer.	3	2	1
7.	Access and maintain a log.	3	2	1
8.	Perform billing functions.	3	2	1
9.	Demonstrate knowledge of workflow.	3	2	1
10.	Perform close-day procedures.	3	2	1
11.	Adhere to insurance laws and regulations.	3	2	1

Total # of Points _____ (a score of 20 or greater is required)

Comments: _____

Customer Service

RATING:

3 = **Able to perform entry-level skills.**

2 = **Has performed skill during training program; additional training is required to develop entry level skills.**

1 = **Familiar with process, no opportunity to perform during training program or unable to perform job with entry-level skills.**

		Score		
1.	Coordinate mass mailings.	3	2	1
2.	Follow up and obtain expiration dates.	3	2	1
3.	Complete application.	3	2	1
4.	Obtain missing information.	3	2	1
5.	Maintain business log.	3	2	1
6.	Perform telemarketing activities.	3	2	1
7.	Provide insurance information to customers.	3	2	1
8.	Coordinate sales and marketing activities.	3	2	1
9.	Initiate/verify agents licensing.	3	2	1

Total # of Points _____ (a score of 20 or greater is required)

Comments:

Special Projects or Certifications

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Instructor/Mentor Comments: _____

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Instructor/Mentor Signature _____

Date Signed _____

Notes